CM/ECF Version 4.0 Upgrade – Attorney Information

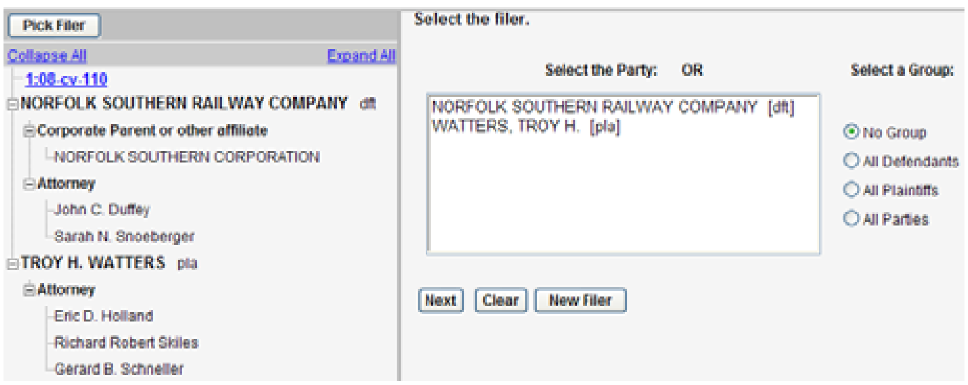
(Effective December 1, 2009)

E-Filing Modifications

Selecting the Filer

A case participant tree has been added in the left pane of the *Select the Filer* screen, so e-filers may view a list of parties and attorneys when selecting the filer(s). The **+** and **–** icons for each branch expand or collapse the branch, respectively. To designate the filer(s) for an electronic submission, select the appropriate party name(s) from the right pane, then click the **Next** button.

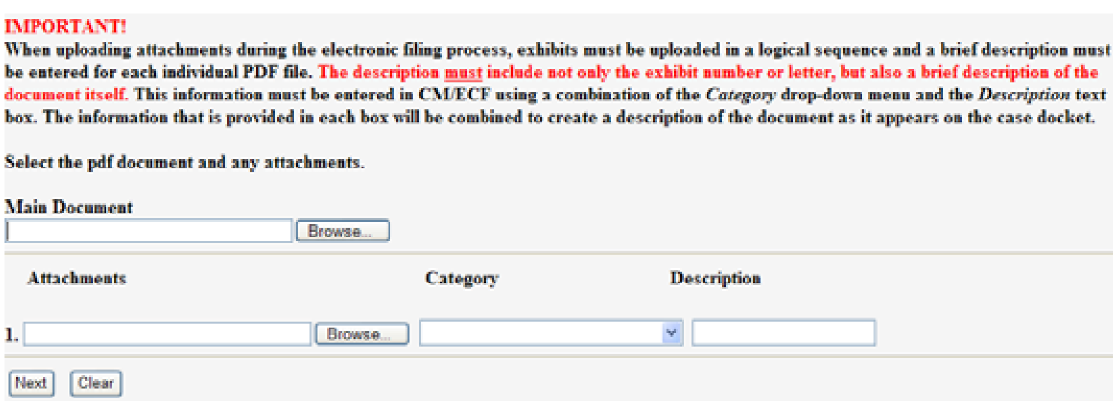
NOTE: The **New Filer** button located in the right pane may be used only in the rare situations requiring the addition of a new party to a case (example: Motion to Intervene).



Adding Documents and Attachments

Release 4.0 includes modifications to the way documents and attachments are added and handled in CM/ECF. The changes include a new single screen for document and attachment uploading during docketing, and an improvement in the way attachments are numbered on the Document Selection screen.

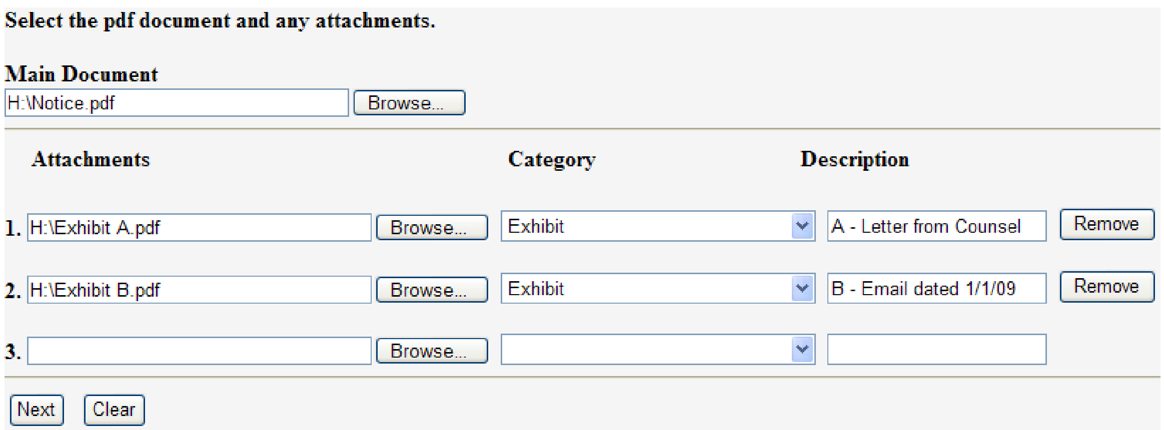
The process of adding a main document and attachments during docketing has been streamlined to only require one screen, shown below in its initial state.



After browsing and selecting the appropriate *Main Document*, the filer should click the **Browse** button in the *Attachments* section to add the first attachment. Once a PDF document is selected, the filer **must** select a Category and enter a Description to further describe the attachment. As the process of adding an attachment is completed, a new row will appear so the user may add a second attachment if necessary. Additional rows will be added as needed.

In the example below, if only two attachments need to be added, the user should leave the fields in the third row blank and then click **Next**. If additional attachments should be added, the user should click **Browse** for each attachment and then add the document.

To remove an attachment, the user may click **Remove**. If the user clicks the **Clear** button after adding documents and attachments, the screen will be returned to the initial state.

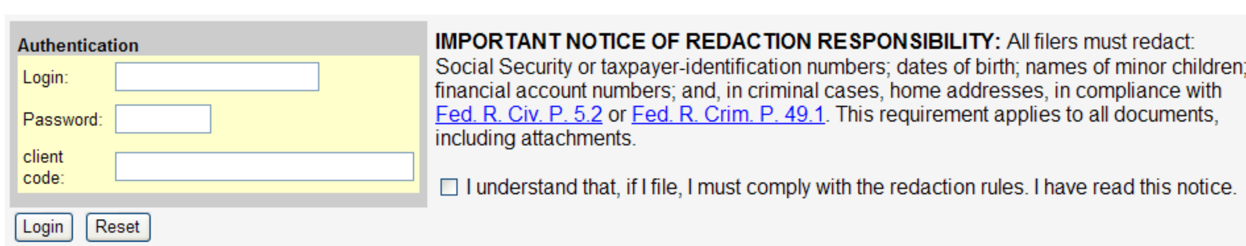


File Size Limitation

When a filer attempts to upload a PDF document that is larger than the set document file size limit of 5MB, the resulting error message now includes the file size of the offending PDF.

Redaction Message

A check box with the following text has been added to the login screen for e-filers to acknowledge that they have read the redaction disclaimer. The filer cannot proceed unless the box has been marked before login.

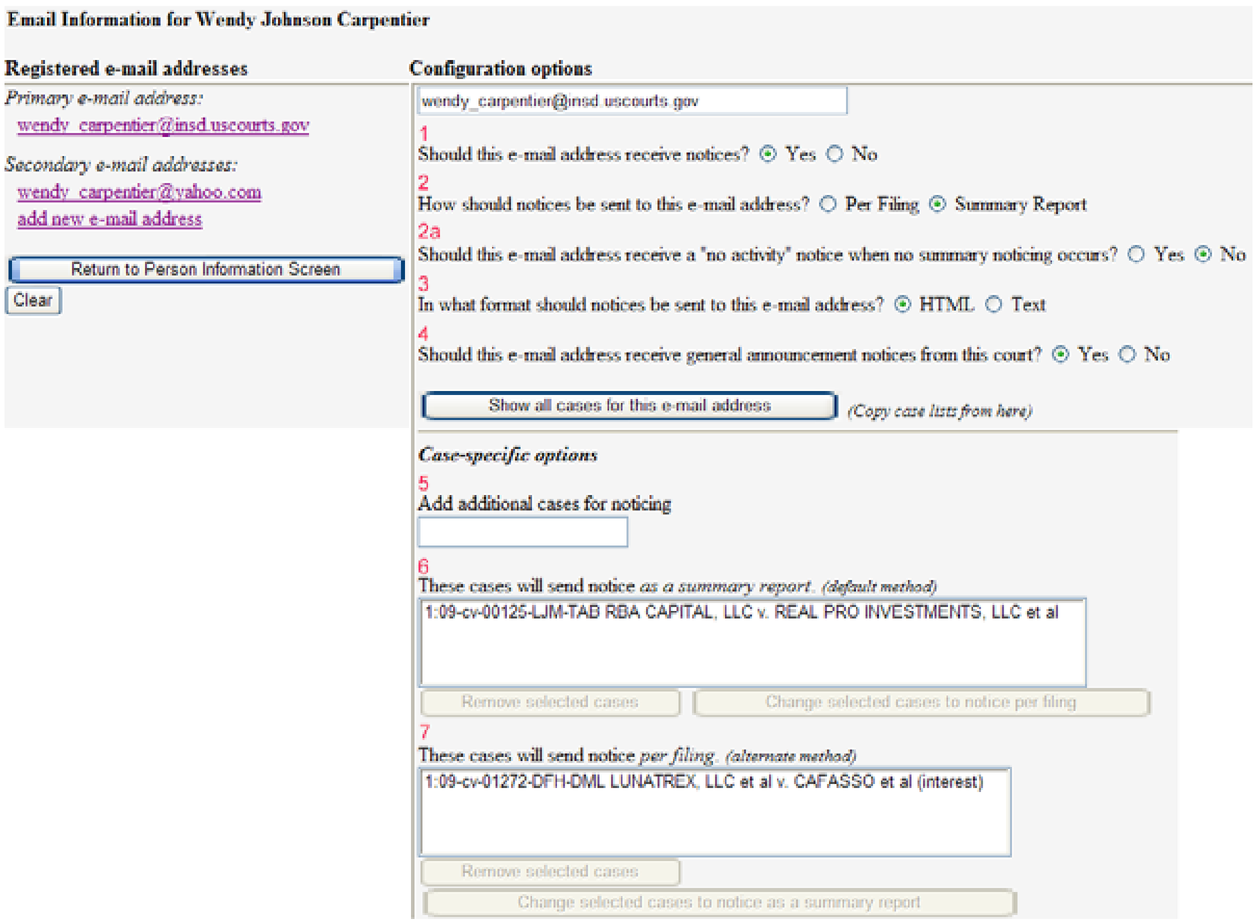


ECF Account Changes

Maintain Your Account Modifications

The *Email Information* screen under Maintain Your Account has been modified to provide more streamlined functionality. Additional options are presented to the user rather than being hidden. Cutting and pasting multiple case numbers from one ECF account to another and/or from one delivery method to another is now allowed.

The initial *Email Information* screen is divided into two panes. In the left pane, titled *Registered e-mail addresses,* the primary email address and secondary email addresses, if any, appear as hyperlinks.



When the user clicks the primary or secondary email address hyperlink in the left pane, configuration options appear under the email address in the right pane. The email notification settings are divided into two sections; *Configuration options* and *Case-specific options*.

Following is an explanation of each of the e-mail notification options that appear above:

Email Option	**Description**
1. Should this email address receive notices?	For the primary email address, the default is *Yes*. To disable the primary address, select *No*. If set to *No*, the primary email address will not receive Notices of Electronic Filings (NEFs). It is recommended that this option always be set to *Yes*.
2. How should notices be sent to this email address?	Sets the default delivery method for notices sent to this address. If *Per Filing* is selected, an email will be sent for each individual NEF. If *Summary Report* is selected, one daily summary email notice that lists all filings for a 24-hour period will be sent and an additional option (see 2a) is added to the screen.
2a. Should this email address receive a "no activity" notice when no summary noticing occurs?	If *Yes* is selected, the Daily Summary Report email will include the message "no transactions found for this time period" if no activity occurs in the cases for which the user is configured to receive summary notices. If *No* is selected, then no e-mail will be generated when there is no case activity.
3. In what format should notices be sent to this email address?	Controls the format of the emails – either HTML or Text. HTML is the preferred format.
4. Show all cases for this email address?	Displays a list of all of the cases for which the user is configured to receive NEFs.
5. Add additional cases for noticing	Allows users to add cases in which they are not an active participant, but would like to receive NEFs. There is <u>no</u> free look associated with these notices.
6. These cases will send notice as a summary report. (default method)	This option will correspond with the default method selected under item #2. For the example above, a daily summary email notice that lists all the filings for that day will be sent.
7. These cases will send notice per filing. (alternate method)	This option will provide an alternative to the default method selected under item #2. For the example above, an individual email will be sent for each NEF.

To receive NEF's in additional cases that interest you, enter the case number(s) in the *Add additional cases for noticing* text field in the bottom right pane and then either click **Enter** or **Find This Case**. After selecting the appropriate case(s), click **Add case(s)**. This will add the case(s) to the list of cases in the default method of service list (the first list of cases).

To move cases from the default method list to the alternate method list, the user should click the case number(s) in the primary list and then click the **Change selected cases to notice as a summary report** button (if summary noticing is the default method, then this button will be labeled **Change selected cases to notice per filing**). The cases will be moved to the alternate method list. To delete cases from the default method list or the alternate method list, select the case(s) and then click the **Delete selected cases** button.

For secondary email addresses, an additional option, **Should this e-mail address receive notice for all cases in which this individual is a participant?,** appears in the Configuration Options section of the screen. The user can answer **Yes** or **No**.

To remove an email address, the user should click on the address on the left pane. This will cause the email address to display in a text field on the right pane, along with all the configuration options and case lists (if any) associated with the email address. The user should remove the email address from the text field. If the user wants to change the email address to a different one, the user should immediately type the new address in the text field. **If the user clicks anywhere outside the text field while a complete email address is not in the text field, all of the configuration options and case lists will disappear from the screen, and the previous email address and settings will be removed.**

PACER Modifications

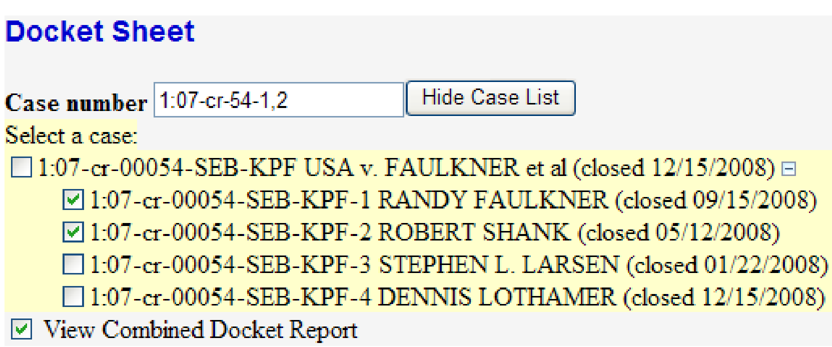
Query

The Query screen has been modified to allow PACER users to conduct a search by case number or any combination of the following:

- Case Status (open, closed, both)
- Filed Date
- Last Entry Date
- Nature of Suit
- Cause of Action (NEW search feature!)
- Last/Business Name, First Name, or Middle Name
- Type (attorney or party)

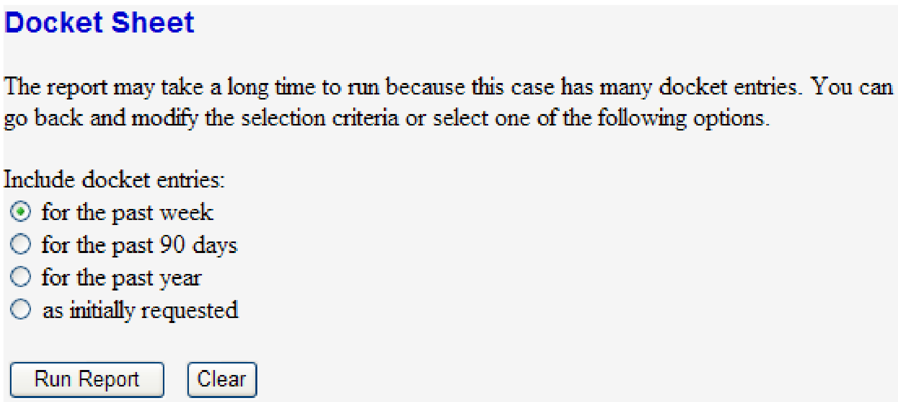
Combined Docket Report – Criminal Cases

PACER users may now run a combined Docket Report for a subset of criminal defendants in a multi-defendant case. A new *View Combined Docket Report* checkbox will be displayed beneath the case number list when a case number for a multi-defendant criminal case has been entered and two or more of the criminal defendant cases have been selected. Selecting the *View Combined Docket Report* checkbox allows the user to run the combined form of the report for the chosen subset of defendants.



Large Docket Report Warning

Depending on the selection criteria entered by the user, it is possible for a large amount of data to be included in the docket report output for a lengthy case docket. A warning with additional options now displays when the requested report output exceeds 500 docket entries. Users are presented with options to help narrow the search to include docket entries for the past week, the past 90 days, the past year, or the user may proceed as initially requested.

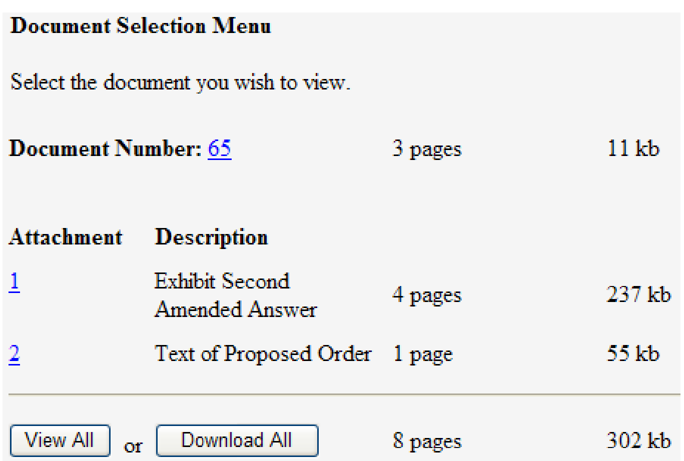


Document and Attachment Numbering

When viewing a document with attachments, the document selection screen has been modified so that the attachments are numbered beginning with 1. As a result, the attachment numbers are consistent throughout the CM/ECF program (e.g., docket text, the document selection screen). Previous versions of the software listed the Main Document as Part 1 and any attachments followed in numerical order, causing Exhibit 1 to be Attachment 2.

Also, the file sizes of each PDF document and the total size of all of the documents for a docket entry are displayed on the document selection screen.

This retroactive change affects all attachments previously filed in CM/ECF, so any reference to an attachment number in a document filed prior to this upgrade will be off by one number.



PDF Headers

The CM/ECF software will now correctly place the PDF header on all scanned PDF documents in the correct position. Previously the PDF header on scanned documents would occasionally appear in positions other than the top of the page. The software now correctly estimates the page size of the PDF documents so that the header is placed correctly.

PACER Billing

When the Review Billing History option is selected in CM/ECF a new browser window will open outside of CM/ECF. From this screen, the user may search for transactions in recent months for a specific court or all courts. A message inside the *Date Range* box provides a specific range of dates for which transactions are available.

Transactions for months prior to those available via the CM/ECF Billing History Report can be obtained via the *Review Transaction History* option within the Account Information section of the Pacer Service Center site.